Dapresy MR Technology Survey 2017/18

Summary of key findings

This annual survey has been running for 14 years and captures how 211 research companies from 32 countries worldwide are making use of technology. There is a core set of tracking questions on the industry's use of technology with four technology-led topics examined in more depth, which this year are automation, mobile interviewing practices, reporting practices (including how clients consume data) and Digital Strategies.

Trends in research modes

Online interviewing is the dominant interviewing mode, accounting for 57% of all interviews done, and practiced by all but a handful of MR companies, but it is also the industry's only high-volume mode. The second and third most important modes, CATI and CAPI account for 13% and 12% respectively, a level of activity at which they could be considered to be niche or specialist modes.

Interviewing on paper has all but disappeared, accounting for 6% globally now. Mixed mode research has remained flat for many years, and also accounts for just 6% of volume in 2017.

The use of access panels for online research has risen sharply, from 35% in 2012 to 45% in 2017. This is counterbalanced by a fall in the use of in-house panels, and declining use of client-provided samples too.

Trends in reporting and delivery modes

On the analysis and reporting side, PowerPoint continues to drown out all other delivery methods. Delivery through online portals with static reports remains stable at just under 20%. Delivery by digital dashboards is growing slowly, but still accounts for just 8% of projects.

Few companies now supply cross-tabular reports to their clients, but demand for bulk cross-tab tools remains strong – 83% of companies say it is essential or important for analysis tools to continue to offer this capability.

Demand for new software

Two out of five companies (38%) want to change some or all of their research software in the next two years. Of those looking for software, data analysis and reporting software is the most likely to up for replacement.

Mobile practices

Since 2011, the proportion of online interviews taken on mobile devices has escalated from 7% to 37% in 2017. Yet the 2014 the survey found that only 48% of companies routinely considered mobile when designing online surveys, and only 31% claimed that all or nearly all of their surveys would work on mobile devices. Today, mobile is considered at the design stage at 71% of firms, and those offering full support for mobile participation has more than doubled, to 67%. This shows an industry that has now largely embraced mobile participation, aided by software providers who have strengthened their support for mixed online/mobile participation.

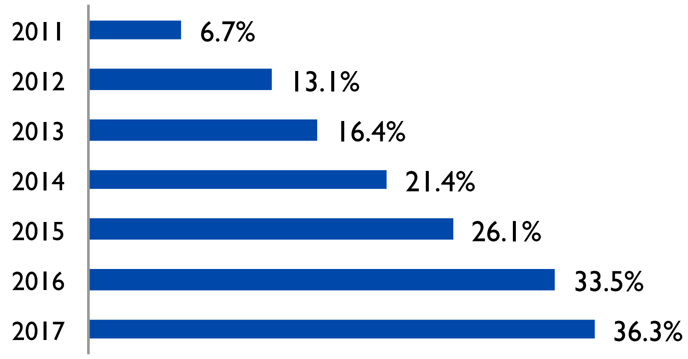
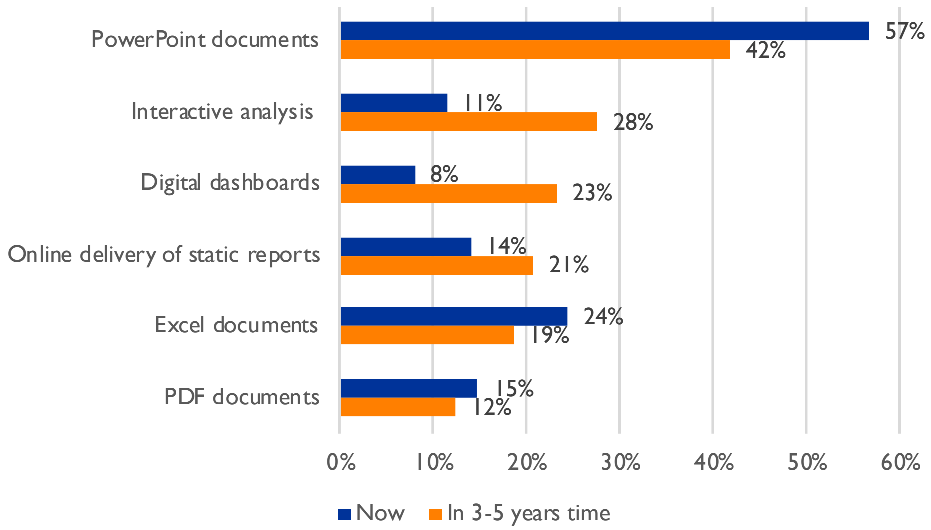


Figure 1 Mobile or smartphone participation in online surveys

Delivery methods and how clients consume research

PowerPoint continues to dominate delivery methods, but that may soon change. While just 3% of clients access their research on dashboards or portals today, companies expect this to increase to 23% in three to five years' time, and for more projects to be delivered across multiple channels.



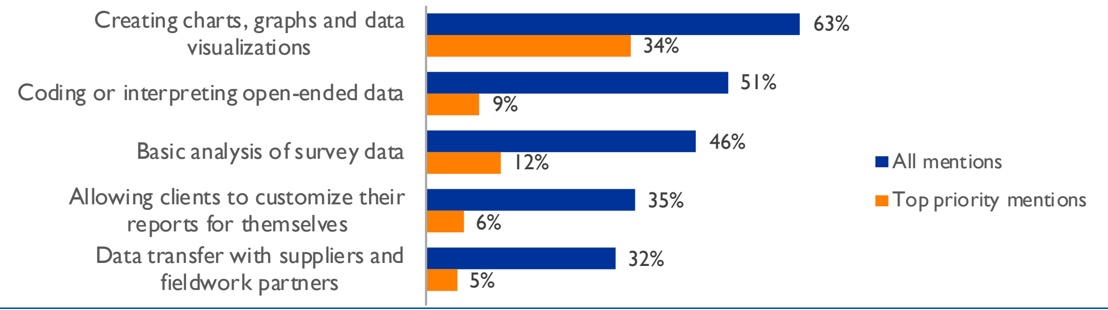
Predicted changes in how research data is provided to clients: 3-5 years' time against now.

The survey also points to where PowerPoint is perhaps being abused. In addition to most firms using it to support a classic presentation or debrief, large numbers of companies are using it simply to deliver big files full of charts to clients (35% of firms), or create reports to be emailed rather than presented (70%).

Automation

Firms identify charting as their principal target for further automation. They also want to automate open-ended response coding, and have analysis tools undertake the basic stages of analysis for them automatically. They want software developers to focus on data visualization and bringing more charting capabilities into their tools.

Such dreams may remain unrealized given that many participants do not think their companies are investing enough in automation. They also report that funding for automation initiatives tends to be short-term and small-scale, with only 13% of firms having a specific automation budget.



The 5 most popular targets for automation: all and top priority mentions

Digital strategies

As businesses generally are doing increasing amounts of business 'digitally', very few research companies (5%) have so far developed their own digital strategies. Around one in three are, at least, discussing or developing a digital strategy.

Among those who are, the subject areas covered tend emphasize established ways of doing research, rather than new or emerging technologies. As with automation, dedicated funding is hard to find, as is the appointment of anyone really senior to direct the strategy. Commitment across the industry to a digital future appears to be wholly inadequate. We hope the plans being formulated will urgently turn into action.

Research sponsored by Dapresy and conducted by meaning ltd.

Full report available from dapresy.com or meaning.uk.com